



Timeline/Activities: Quick Reference

Timeline/Activities helps you document and track your outreach and monitoring. See below for a broad explanation of when and how to use each type of item:

In Timeline/Activities, click +, then select...

Quick Create: Phone Call

Owner * Mary Moran

Subject * 9/23 Follow-Up Needed

Call From * Mary Moran

Call To

Type	Daily Monitoring
Call Status	Answered
Description	Followed up on contact's daily assessment submission and
Duration	30 minutes
Due	10/7/2020 8:00 AM

Phone Call

... to document or schedule all attempted or successful phone outreach.

- ✓ Use "Due Date" to schedule in advance
- ✓ Use "Owner" to assign
- ✓ Follow local protocol on "Subject" and "Description," and document Q&I referrals per the job aid
- ✓ Use "Call Status" and "Type" to provide details
- ✓ **Must be closed** by clicking the checkmark
- ✗ **IGNORE** the "Made/Received" toggle when closing

Task

... to document or schedule all other monitoring activities, such as field visits, review of assessments, or other necessary follow-up activities.

- ✓ Use "Due Date" to schedule in advance
- ✓ Use "Owner" to assign
- ✓ Follow local protocol on "Subject" and "Description"
- ✓ **Must be closed** by clicking the checkmark

Note

... to record reference information, such as resource needs or chronic conditions.

- ✓ Record reference information only
- ✗ Do **NOT** use to record tasks or phone calls

Contact's Chronic Condition

Contact has chronic condition X resulting in ABC and requiring XYZ extra support

Segue UI 14 B I U A [color picker] [font size] [bullet list] [numbered list] [link icon] ...

Cancel Add note

Always remember to **close out your completed phone calls and tasks** by hovering over the item, clicking the checkmark, and selecting the appropriate "State" option **ONLY**.